Oracle Hyperion Planning 11.1.1: Create & Manage Applications

Durée: 5 Jours

Description

This course is designed to teach you how to create and administer applications using the Planning software. You learn how to create applications, add dimensions and members, import members, load data, set up security, create data forms, set up task lists, set up calculations, and move a plan through the planning cycle. Exercises and a case study provide hands-on practice.

Learn To:

Create Planning applications

Set up security for users, groups, and members

Create data forms and enter data

Set up business rules

Manage the planning process

Import data and metadata

Audience

Administrator

Développeurs Forms

Forms Developer

Functional Implementer

Cours pré-requis

Cours pré-requis obligatoire(s)

Basic knowledge of planning and budgeting

Working knowledge of Essbase recommended

Basic Microsoft Windows skills

Basic Microsoft Excel or Lotus 1-2-3 skills

Objectifs

Load data into Planning applications

Set up security for users, groups, and members

Create data forms and enter data

Set up and test business rules

Review budget data by using process management

Migrate application artifacts

Create Planning applications

Creating Attributes
Assigning Attribute Values
Member Formula Overview
Creating Smart Lists

Loading Metadata from a File
Metadata Load Files Overview
Formatting Load Files
Loading Metadata Process
Best Practices
Loading Metadata from Interface Tables

Creating Applications
Application Creation Process
Plan for Application Setup
Setting Up Application Components
Selecting Dimensions
Configuring Application Settings
Adding Dimensions from Shared Library
Activating Dimension Associations
Adjusting Performance Settings

Deploying Applications
Deployment Process
Validating Applications
Comparing Applications
Deploying Applications
Redeploying Applications

Setting Up Exchange Rates
Currencies and Exchange Rates
Exchange Rates Tables Overview
Creating Exchange Rate Tables
Exchange Rates and the HSP_Rates Dimension
Generating Currency Conversion Calculation Scripts

Loading Data and Calculating Data
Data Loads
Data Calculations
Loading Data Using Administration Services
Creating Data Load Rules
Staging Data with Interface Tables
Loading Data Using ETL Tools

Provisioning Users and Groups and Setting up Access Rights
Planning Security Overview
User and Group Provisioning Overview
Provisioning Users and Groups
User Roles
Generating Provisioning Reports
Assigning Access Rights
Importing Access Rights

Creating Security Filters

Creating Data Forms and Folders
Data Forms and Folders Overview
Data Forms and Folders Overview
Setting Up Data Forms
Creating Composite Data Forms
Printing Data Form Definition Reports
Assigning Access Rights to Data Forms
Assigning Data Form Folder Security

Customizing Data Forms
Exporting and Importing Data Forms
Menus
Setting up Custom Messaging
Specifying Advanced Settings
Managing User Variables
Setting Up User Preferences

Entering Data
Submitting Data in Data Forms
Launching Dimension Editor from Data Forms
Spreading Data
Adjusting and Annotating Data
Calculating Data in Data Forms
Entering Data with Smart Lists
Navigating Data Forms with Menus

Entering Data Using Smart View
Smart View Overview
Working with Smart View
Working with Ad Hoc Analysis
Working Offline

Creating Business Rules
Business Rules and Calculation Manager Overview
Business Rules Creation Process
Assigning Calculation Manager Security
Determining Calculation Requirements
Launching Calculation Manager
Setting Up Business Rules
Validating and Deploying Rules
Assigning Launch Access and Launching Business Rules

Managing Business Rules and Adding Variables and Formulas
Templates Overview
Creating Custom-Defined Templates
Creating Business Rules with Templates
Creating Rulesets
Validating and Deploying Business Rulesets
Creating Variables
Setting Up Runtime Prompt Variables

Creating Formula Components

Managing the Approval Process and Creating Task Lists
Managing the Review Cycle for Planning Units
Copying Data Between Versions
Clearing Cell Details
Copying Data
Navigating Task Lists
Building Task Lists
Assigning Access to Task Lists
Validating Task Lists and Reporting on Task Lists

Managing Application Lifecycles
Lifecycle Management Overview
Artifacts
Viewing and Searching for Artifacts
Viewing LCM Reports

Building and Setting Up Classic Applications
Classic Application Creation Process
Configuring Data Sources in Classic Application Wizard
Working with Classic Application Wizard
Building Member Hierarchies
Modifying Member Properties
Creating Alias Tables and Smart Lists, and Setting Up Member Formulas and UDAs
Loading Metadata, and Data into Classic Applications and Importing Data Forms
Creating Business Rules for Classic Applications